

PROCEDURES MANUAL

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I. INTRODUCTION

The EOF On-Line Supplemental Roster System was developed by the New Jersey Commission on Higher Education, EOF Office and the Higher Education Student Assistance Authority (HESAA) to provide New Jersey colleges and universities with an electronic equivalent to the paper supplemental rosters. The EOF on-line roster provides payment data to schools faster by taking advantage of network connectivity and reduces the amount of paper required to perform payment processing.

Institutions request first time EOF awards and verify the accuracy of renewal awards via the on-line roster. After certification, the requests are applied to the students' grant master file records. Students are then notified by Student Eligibility Notice (SEN) of their estimated award.

Access to the on-line roster is gained through the HISFP1 region on the Gateway Network, and most functions are selected from the menu. This document provides step by step instructions on accessing the main selection menu as well as specific instructions on performing each of the functions that this system allows.

Information accessed through the on-line roster is confidential. In order to protect the data, security procedures have been established. Authorized staff is provided with training and logon identification codes. If you have any questions concerning the security procedures please contact the Grants and Scholarships' security administrator at (609) 588-3286.

For additional assistance with the on-line roster, please contact:

Mary Alice Everett
Program Technician
voice#: (609) 984-2800
fax#: (609) 633-8420
e-mail: meverett@che.state.nj.us

IMPORTANT:

User Ids are suspended and/or deleted if not used within 60 days.
Keep your Gateway access active! Log on daily!

Logon passwords must be changed every 30 days.

CALL THE HELP DESK TO REINSTATE EXPIRED IDS/PASSWORDS

II. WHO APPEARS ON THE ON-LINE ROSTER

The EOF on-line roster is a student payment request system. The students listed on this roster include:

1. initial students from your institution's applicant roster who have met the basic income and residence eligibility requirements for EOF;
2. eligible renewal students who have been automatically renewed for an EOF grant; and
3. renewal students who have not been automatically renewed for an EOF grant.

Students appearing on the on-line roster meet ALL of the conditions listed below:

- current year FAFSA is filed; and
- your institution is listed as college of first choice; and
- Tuition Aid Grant (TAG) record is complete and active; and
- student's EOF eligibility code is 1, 3, 5, 6, 8, 9, 11, 12, or 14; and
- TAG award is not canceled for the fall and spring terms for TAG cancellation codes 1, 2, 3, or 7.

In addition to the requirements above, renewal students who have been automatically renewed for an EOF grant at the previous year's level meet the following conditions:

- **full-time** payment was received during the previous spring term; and
- student is attending the **same** college at which the previous spring payment was received.

Students who have not been renewed automatically include:

- renewal students who did not receive an EOF award the previous spring semester;
- incoming transfer students who received an EOF award at another institution the previous spring semester;
- renewal students who had a reject code the previous spring semester;
- renewal students who received a part-time EOF award the previous spring semester; and
- renewal students who were coded as non-funded the previous spring semester.

You must determine continued eligibility and add these students to the roster.

A. INITIAL EOF STUDENTS

Students who have not previously received EOF and whose family incomes exceed the EOF eligibility ceiling (Eligibility codes 2 and 4) do not appear on the roster. However, you may wish to review their records to determine if they would qualify for a grant under EOF Regulation 9A:11-2.4(f). Eligible students should be added to the roster.

Students who have not previously received EOF and who reported their year in college as 4 (and up) are not eligible to receive an EOF award. Award requests for these students will be blocked. Class level should be verified using institutional records. If the year in college is incorrect, a change form must be filed with HESAA. When the change has been made, the student must be resubmitted on the on-line roster.

B. RENEWAL EOF STUDENTS

Renewal students with an automatically renewed EOF award should be evaluated to determine if they still have unmet need and meet the institution's standards of academic progress for EOF students (EOF Regulation 9A:11-2.13). Students who are determined to be no longer eligible must be deleted from the on-line roster.

Renewal and transfer students who previously received EOF but who have not been renewed automatically should be evaluated to determine if they still meet the test of unmet need and are making satisfactory academic progress. Eligible students should be added to the roster.

C. INCOME ELIGIBILITY SCALE

1. EOF income eligibility scale (EOF Regulation 9A:11-2.4) for both dependent and independent students for AY 2003-2004 is as follows:

<u>Household Size</u>	<u>Maximum Income</u>
1	\$17,720
2	23,880
3	30,040
4	36,200
5	42,360
6	48,520
7	54,680
8	60,480

Add \$6,160 for each additional member of the household.

2. EOF **over-income** criteria for both dependent and independent discretionary students for AY 2003-2004 is as follows:

<u>Household Size</u>	<u>Maximum Income</u>
1	\$24,897
2	33,551
3	42,206
4	50,861
5	59,516
6	68,171
7	76,825
8	85,480

Add \$8,655 for each additional member of the household.

Important note: Initial EOF eligibility is determined on the basis of historical poverty, economic and educational criteria. Because a student or a student's family currently falls within the income criteria does not make him/her automatically eligible for EOF. Refer to EOF Regulations 9A:11-2.2 through 2.4 for complete eligibility rules.

III. ACCESSING THE ON-LINE ROSTER

The instructions presented in this chapter describe the steps required to access each of the functions allowed in the EOF on-line roster. Those functions include:

- accessing the main selection menu
- viewing EOF students' information
- updating existing EOF students' information
- viewing college allocations, payment totals, and summary data
- entering new students on the roster
- entering comments to explain award changes
- certifying a roster upon completion of all updates

Access to the EOF on-line roster is made through HESAA's website at www.hesaa.org. Double click the HESAA WebLink icon and follow the instructions. Once you are connected to the HESAA system, follow the instructions outlined below.

A. ACCESSING THE MAIN MENU

Most functions in the EOF on-line roster are selected through the main menu. The main menu is the first screen that the user sees each time this product is activated. The main menu is also the screen used to collect name and college code information for security purposes. The transaction code assigned to the EOF On-line Roster is XGE0.

How To Access The Main Menu

- A. At the HESAA logo screen:
 - Type in User Id.
 - Type in password.
 - Press ENTER.
- B. When the HESAA main menu screen appears:
 - Move the cursor to the selection area on the line for HISFP1.
 - Press ENTER.
- C. When the OSA Help Screen Facility screen appears:
 - Clear the screen.
 - Type XGE0.
 - Press ENTER.
- D. To select the desired function:
 - Enter the letter that corresponds to the function you want to perform.
 - Enter your name.

- Enter your four-digit college code.
- If you are at an institution with multiple EOF schools, enter the two-digit school code for your school.
- Press ENTER.

E. Available key options:

- ENTER - To process your entries and move to the selected function.
- CLEAR - To exit the EOF on-line roster.

B. UPDATING THE ROSTER (Menu Option A)

Option A allows institutions to access an on-line version of the EOF supplemental roster. This screen also allows institutions to adjust term requests and provide or change additional information pertaining to the student's EOF eligibility. An "expanded" view of each student's record can also be selected to view roster data in more detail.

The Commission/EOF Office does not process updates that are entered through this option until the institution has certified the roster as **complete (please refer to Section G: Certifying the Roster)**. When certification has taken place, the file will be locked to prevent further updates and all changes will be applied to the grant master files in preparation for the next payment cycle. Please note that only the most recent roster is available for display or update.

How To Access Option A - Update Roster

A. To select roster processing:

- Enter "A" as the main menu option.
- Enter name, college code, and EOF school code if the institution has more than one EOF school. (This is required each time the XGE0 transaction is initiated, but not every time you return to the main menu.)
- Press ENTER. (The first page of the roster will be displayed.)

B. To view subsequent roster pages:

- Press PF8 to scroll forward one page.
- Press PF7 to scroll backward one page.

C. To find a specific student on the roster:

- Enter the last name and first name (optional) to be accessed.
- Press PF8 or ENTER; student will appear as the first entry on the screen.
- Press PF7 and that student will appear as the last entry on the screen.

NOTE: When using the name-scrolling feature, if the name entered is not on file, the screen display will begin with the next (or prior) name on file.

D. To view the expanded display for a student:

- Position the cursor in front of the record you wish to view, and type the letter “s” and press ENTER.
- The expanded display will appear on the screen.
- To return to the roster display, press PF3. The student whose record was just viewed will appear at the top of the screen.
- To return to the main menu, press PF4.

NOTE: The information displayed on the expanded record will not change to reflect changes made on option A. The information contained on this page is set as of the date the roster was produced.

E. To enter or change information:

- Enter the appropriate information in the proper column. If information already exists in the column, overwrite the existing information.
- If the student is not attending your institution for one of the semesters, the fields pertaining to the semester of non-attendance will be locked and you will be unable to enter values for that semester. You will be able to enter information for the semester that the student is attending your institution.
- Press ENTER. (Processing will also occur when PF4, PF7, or PF8 are pressed, but the current display will change. Therefore, these choices are not recommended.)
- Once the information has been entered, the fall and spring status codes will become blank on the row for the updated student.

F. To end roster processing:

- Press PF4 to return to the main menu for selection of another option. (Any changes on the screen that have not been processed will be processed prior to returning to the main menu.)
- Press CLEAR to exit the EOF on-line roster.

C. **VIEWING THE TOTALS PAGE (Menu Option B)**

The totals page option allows institutions to view on-line the totals that appear at the end of each printed roster. These totals are set in time and correspond to the amounts contained on the NJ Grants System college file at the time the roster was created. The date on which these totals were created is found on the totals page. **The values in these fields will not change to reflect changes to awards entered through options A and C as they are made. They will reflect the changes, however, when the roster is processed and a new roster is made available.**

How To Access Option B - Browse Summary Pages

A. To select the totals page:

- Enter “B” as the main menu option.
- Enter name, college code, and EOF school, if necessary.
- Press ENTER. The totals page will be displayed.

B. To exit the totals section:

- Press PF4 to return to the main menu for selection of another option.
- Press CLEAR to exit the EOF on-line roster.

D. USING THE “WRITE-IN” PAGE (Menu Option C)

The “write-in” page option allows institutions to enter students on-line who are not already on the roster. Students who have term requests entered for them on this page must already be on the NJ Grants System master file and must be attending the institution making the request for at least one semester. Information is entered for each student for the semester or semesters required. The “write-in” page functions similarly to the update page but **may be used only for students not already appearing on the EOF roster.**

How to Access Option C - Add Students to the Roster

A. To select the write-in page:

- Enter “C” as the main menu option.
- Enter name, college code, and EOF school, if necessary.
- Press ENTER. The write-in page will be displayed.

NOTE: This page will appear with blank lines for all rows that do not contain student information. Once students have been entered, they will appear in the order entered until either the PF7 or PF8 key is pressed, or the option is exited. Students will then appear in alphabetical order.

B. To exit the write-in section:

- Press PF4 to return to the main menu for selection of another option. (Any changes on the screen that have not been processed will be processed prior to returning to the main menu.)
- Press CLEAR to exit the EOF on-line roster.

E. ENTERING COMMENTS (Menu Option D)

The comments page option allows you to explain the reason(s) for certain entries on options A or C if the entries are unusual in nature, or if you are unable to enter values in a special case because of edits within the system. The Commission/EOF Office will respond to comments after the roster is certified.

How To Access Option D - Comments

A. To select the comments section:

- Enter “D” as the main menu option.
- Enter name, college code, and EOF school (if applicable).
- Press ENTER. (The first comments page will be displayed.)

B. To enter comments:

- The comments page is a “free-form” section and comments may be entered anywhere within the blank area of the screen.
- Press ENTER. (Comments will also be stored when PF4, PF7, or PF8 keys are pressed, but the current display will change. Therefore, these choices are not recommended.)

C. To access additional comments pages:

- Press PF8 to access an additional page for comments. (Before additional pages can be accessed for comments, text must appear on at least one line of the page being displayed.)
- Blank pages may appear between pages that contain comments if the comments are removed from existing pages and additional pages have already been entered behind the deletions.

D. To exit the comments section:

- Press PF4 to return to the main menu for selection of another option. (Any comments on the screen that have not been stored will be stored prior to returning to the main menu.)
- Press CLEAR to exit the EOF on-line roster.

F. BROWSE THE ROSTER (Menu Option E)

Option E allows you to view the students who appear on Option A in a "browse only" capacity. This option is VIEW ONLY and does not allow updates.

How to Access Option E - Browse the Roster

A. To select the browse page:

- Enter "E" as the main menu option.
- Enter name, college code, and EOF school, if necessary.
- Press ENTER. The browse page will be displayed.

B. To browse subsequent roster pages:

- Press PF8 to scroll forward one page.
- Press PF7 to scroll backward one page.

C. To find a specific student on the roster:

- Enter the last name and first name (optional) to be accessed.
- Press PF8 or ENTER; student will appear as the first entry on the screen.
- Press PF7 and that student will appear as the last entry on the screen.

D. To view the expanded display for a student:

- Position the cursor in front of the record you wish to view, type the letter "s" and press ENTER.
- The expanded display will appear on the screen.
- To return to the roster display, press PF3. The student whose record was just viewed will appear at the top of the screen.

E. To exit the browse section:

- Press PF4 to return to the main menu for selection of another option.
- Press CLEAR to exit the EOF on-line roster.

G. CERTIFYING THE ROSTER

Once the updating of a roster has been completed, the roster must be **certified** before it can be processed. Certification of a roster is a two-step process that includes:

- the “electronic” sign-off of the roster through a transaction separate from the menu (XGE6)

AND

- the return to the Commission/EOF Office of a signed certification page BEFORE 3:00 PM.

Both steps must be completed before the roster is considered certified. Once the roster has been certified electronically, no further updates are permitted. However, data can still be viewed on-line until the next roster is created. Processing will not occur until the Commission/EOF Office has received the signed certification. This certification should be sent by fax to (609) 633-8420.

PLEASE NOTE: The ORIGINAL (hard copy) signed certification page must be submitted to the Commission/EOF Office within one week of processing.

<p>It is the institution’s responsibility to initiate certification. If the signed certification page is NOT RECEIVED BY THE COMMISSION/EOF OFFICE BEFORE 3:00 PM, PROCESSING WILL NOT TAKE PLACE.</p>

Access to the roster certification function is restricted to two individuals designated by the institution. For further information regarding access to this function contact Mary Alice Everett at the Commission/EOF Office at (609) 984-2800.

If a roster has been certified mistakenly, contact the Commission/EOF Office.

How To Access The Roster Certification Page

- Enter “XGE6” from a clear screen.
- Enter your password at the prompt.
- Press ENTER. (The roster certification statement will be displayed).
- The individual authorized to certify the roster must enter his/her name and password where indicated.
- Press ENTER. (The roster will be “locked” to prevent further updates, but processing by the Commission/EOF Office will not occur until the signed certification page has been returned.)
- Press CLEAR. You may now logoff the region.

You can verify that certification has taken place by entering Option A of the roster. If the certification has been done correctly, you will see a message on the bottom line of the roster stating "Roster is locked. No updates are permitted."

IV. ON-LINE ROSTER LAYOUT - DATA ELEMENTS

- A. Option A of the on-line roster lists students in alphabetical order. Data appearing in blue type may not be updated on-line. To correct name and social security number, a change form must be submitted to HESAA.

1. Applicant's Name

This is the name as reported on the FAFSA, or from corrections sent to HESAA.

2. Social Security Number

This is the social security number as reported on the FAFSA, or from corrections sent to HESAA.

3. EOF Award

The EOF Award is a 4-digit field. Award amounts less than \$1000 must have a preceding zero. The minimum semester award is \$100.

When entering data on-line, the EOF award column is viewed as the "term request". This request has not cleared the NJ Grants System and should not be considered valid until after processing. After the Commission/EOF Office has processed the on-line roster, the EOF award column will reflect the award amount or reject code(s) that has been entered on the NJ Grants System.

Renewal students who are automatically renewed for EOF must be evaluated for continued eligibility. It is the responsibility of the institution to verify the attendance of the student and the accuracy of the data. If the information reported is correct, no action is required on your part. The Commission/EOF Office will consider the student's award valid. If the award/reject data is incorrect, delete the wrong information and enter the correct data. If the student is not in attendance, not making satisfactory academic progress, or is no longer eligible for the award, delete the award value by entering four (4) zeroes. **Please note:** a student with a deleted award will remain on the on-line roster as long as your institution is the college of first choice. The student will not be included in any enrollment totals.

UNDERGRADUATE AWARDS AND REJECT CODES

Undergraduate award amounts for full-time and part-time students

	Full-time Maximum Annual/Semester <hr/>	Part-time Maximum Annual/Semester (6-8 credits)	Part-time Maximum Annual/Semester (9-11 credits)
Community Colleges:	\$850/425	\$426/213	\$638/319
State, Rutgers, NJIT, UMDNJ:			
Commuter:	\$950/475	\$476/238	\$714/357
Residential:	\$1200/600	\$726/363	\$964/482
Independent:	\$2300/1150	\$1150/575	\$1722/861

EOF Reject Codes

Reject Code

Explanation

A Applicant's NJEI exceeds the maximum qualifying index for a TAG award.

The Reject A status may be given an override by Commission/EOF Office. The EOF Director must submit the following documentation certifying unmet financial need: institutional award letter, college budget for the academic year, official needs analysis document, and any anecdotal information establishing historical poverty. The EOF program liaison assigned to your institution will review this information and formally notify the institution as to whether the EOF grant award has been approved or denied. **The approved override is for EOF ONLY.**

D Student did not receive TAG in the previous academic year and is ineligible because their FAFSA was received after the October 1 filing deadline. Renewal students whose FAFSAs were received after June 1 are ineligible for TAG.

E-N,P,U Student is a TAG reject for one or more of these codes and is, therefore, ineligible for EOF for the same reason(s).

R Student has received the maximum number of part-time EOF payments allowable. Part-time EOF grants may be awarded three times to students attending a two-year institution and four times to students attending a four-year institution.

T	Student has received the maximum number of EOF payments allowable.
X	The amount of the EOF grant requested exceeds the maximum allowable.
Y	Student has received the maximum number of EOF payments allowable without special approval from the Commission/EOF Office. Formal approval is required from the Executive Director for those students in established five year programs who require a 13th or 14th EOF term award.
Z	Student has received a Garden State Scholars award for that term.

4. Status Code

The Status Code is a computer-generated code used to indicate the status of the EOF award. It may not be edited. The status codes are:

- I** = **Incomplete**; no EOF request on file
- C** = **Complete**; award has been requested and has cleared the system; no further action required
- H** = **Hold**; award requested but institution has exceeded their allocation; award will be blocked until additional money becomes available
- P** = **Pending**; award requested but blocked due to student correctables; institution/student must resolve discrepancy by submitting requested information to HESAA

5. Housing Status

The housing status is a 1-digit field that must be entered for both fall and spring semesters. The codes are:

1 = commuter 2 = resident

NOTE: The spring housing code must be entered when a student is first requested for payment in the academic year. If the spring code is not entered, the system will prompt you to enter the data. However, after the roster has been processed, you will notice that the spring housing code DOES NOT ALWAYS APPEAR on your refreshed roster. DO NOT RE-ENTER THE SPRING HOUSING CODE! As long as the student's spring award appears with a status code of "C" (complete), YOU DO NOT HAVE TO RE-ENTER THE SPRING HOUSING CODE. If the fall and spring housing codes are the same, the spring code will not appear until later in the year when an internal computer program automatically enters the code. Although re-entering the spring housing code is not an error, it is unnecessary work on your part and also creates additional paperwork for the Commission/EOF Office.

6. Admission Type

The EOF admission type is a 1-digit field required for fall and spring semesters (unless an award is being requested for the spring semester only). The codes are:

- 1 = first time EOF (initials); student has never received EOF
- 2 = continuing (renewals); student received EOF the previous sem.
- 3 = non-funded; renewal student who lost eligibility for award but continues to receive services such as counseling and tutoring
- 4 = readmit; renewal student who did not receive EOF the previous semester and is returning to your program
- 5 = transfer; renewal student who last received EOF at another inst.
- 6 = graduating senior enrolled less than full-time; student is graduating at the end of the semester, is enrolled part-time (min. # of credits = 3), and is eligible to receive a full-time award (**PLEASE NOTE:** student will be ineligible for TAG)
- 7 = 10% discretionary; student has never received EOF*
- 8 = part-time; student attending an institution that participates in the EOF part-time program (min. # of credits = 6)

*Where there is evidence that strict adherence to the maximum income eligibility cut-offs will not serve the purpose of the EOF Program, the campus EOF director has the discretion to admit, up to a maximum of 10% of the annual freshman class, students with family incomes as high as, but no more than, 281% of the official national poverty threshold as published annually by the federal government. These discretionary admits, however, must also meet all other eligibility provisions of EOF Regulations 9A:11-2.2 and 2.3. (Refer to page 4 of this manual)

The EOF admission type will change from semester to semester. A student who is an initial in the fall semester, becomes a continuing student in the spring (code 1 to 2). A student who dropped out in the fall and is returning in the spring is a readmit (code 4). The accuracy of these codes is extremely important as they are used to classify students in statistical reports.

Spring semester admits should be coded using the same criteria used for determining a fall admission type. If the spring semester is the first time a student is receiving an EOF award, then use code 1. If the student is a renewal student who did not receive EOF the previous fall semester, the student is coded as a readmit (code 4).

NOTE: When deleting an award for a student who is not returning in the spring semester, DO NOT CHANGE THE SPRING ADMISSION TYPE. It is not necessary to change the spring admission code. As long as a student has a zero award value and an admission type other than 3, that student will not be

counted in any enrollment figures for your institution. Zero (0) is not a valid admission code and will not be accepted by the on-line roster system.

7. Ethnicity

The ethnicity code is a 1-digit field that is required for all students.

- 0 = Not Reported by Student or Other
- 1 = African-American, Non-Hispanic
(A person having origins in any of the black racial groups of Africa.)
- 2 = Native American or Alaskan Native
(A person having origins in any of the original peoples of North America and maintaining cultural identification through tribal affiliation or community recognition.)
- 3 = Asian or Pacific Islander
(A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, The Philippine Islands, Samoa, India, and Vietnam.)
- 4 = Hispanic, Not Elsewhere Classified
(A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race. Use specific categories 6 through 9 if possible.)
- 5 = White, Non-Hispanic
(A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.)
- 6 = Mexican
- 7 = Puerto Rican
- 8 = Cuban
- 9 = Central or South American

8. Sex

The sex code is a 1-digit field that is required for all students.

- 1 = Male
- 2 = Female

9. Historical Poverty Criteria (HCP)

The historical poverty criteria as outlined in EOF Regulation 9A:11-2.2 is a 1-digit field that is required for all incoming freshmen and first-time EOF recipients.

- 1 = Attended or graduated from a DFG A or B school district or a special needs school district;
- 2 = Resided in a municipality that is a high-distress/labor surplus area;
- 3 = Resided in an area that historically has been populated by low-income families, such an area, commonly called a “pocket of

- poverty”, has characteristics of a high-distress/labor surplus area, even if the municipality is not formally so identified;
- 4 = Has a sibling who was or is enrolled in an EOF program;
- 5 = Is a first-generation college student who is, or whose family is, eligible for government assistance and/or educational programs targeted toward low-income and disadvantaged populations (TRIO programs, free and reduced breakfast/lunch programs, food stamps, etc.);
- 6 = Successfully completed a NJ Gear Up state project.

10. Part-time Credits

The part-time credit field is a 2-digit field that is required for PART-TIME REQUESTS ONLY. Only students coded as admission type 8 are to have credits entered. Minimum number of part-time credits allowed is 06, maximum number of part-time credits is 11. Part-time award amounts are listed on page 13. To enter a part-time request:

- Enter 4-digit award amount
- Enter housing, admission code 8, ethnicity, sex codes
- Press ENTER.
- Enter # of credits at prompt.
- Press ENTER.

11. School Code

The school code is a 2-digit field used only by multi-campus institutions. Approved school codes are as follows:

Rowan - Main -----	15
Rowan - Urban -----	80
Montclair-----	20
Montclair/HCP -----	90
Seton Hall -----	28
Seton Hall Pre-Med-----	95
Rutgers - Camden A&S-----	50
Rutgers - Cook -----	11
Rutgers - Douglass-----	06
Rutgers - Engineering -----	14
Rutgers - Livingston-----	02
Rutgers - Newark A&S -----	21
Rutgers - Nursing -----	25
Rutgers - Pharmacy-----	30
Rutgers - Rutgers Coll.-----	12
Rutgers - University NB -----	61

NOTE: Freshman/Initial students will default to the “main” campus roster. For Rutgers University, freshmen will default to school 12.

- B. Additional information for each student is provided on the expanded page. This information is for viewing purposes only and cannot be updated. To correct information on this page, a change form must be submitted to HESAA. Information on the expanded page includes:

1. Applicant’s Name

Student name as reported on the FAFSA, or from corrections sent to HESAA.

2. Social Security Number

This is the social security number as reported on the FAFSA, or from corrections sent to HESAA.

3. Dependency Status

The dependency status of the applicant is provided.

4. Previous College

The code of the institution at which the student received his/her last EOF payment during the previous or prior academic years will be provided, if applicable. This information should be used to identify transfer (renewal) students.

5. Year in College

This is the year in college as reported on the FAFSA, or from corrections sent to HESAA. Students who have not previously received EOF (Eligibility Codes 1 and 3) and who reported their year in college as 4 (and up) are not eligible to receive an EOF award. Award requests for these students will be blocked. Class level should be verified using institutional records. If the year in college is incorrect, a change form must be filed with HESAA.

6. Term of First Entry

The term of first entry into the EOF Program is provided if the student received an EOF grant during a previous academic year. If data are provided, the term and year of the first grant will appear as shown in the following examples:

5-02 = Summer Term 2002

1-02 = Fall Term 2002

3-02 = Spring Term 2003

(Please note: the 3-02 refers to the spring term of the 2002-2003 academic year, not the spring 2002 term.)

7. Last Funded

The term and year of the student's last EOF grant will be provided. This area will be blank if the student has not been funded previously or was funded only during the summer. If data are provided, the last term funded will appear as shown in the following examples:

1-02 = Fall Term 2002

3-02 = Spring Term 2003

(As with the term of first entry, 3-02 refers to the spring term of the 2002-2003 academic year, not the spring 2002 term.)

8. Award/Reject TAG and EOF

The TAG and EOF award or reject code information is as of the last update. When the on-line roster is refreshed, the award/reject from the NJ Grants System will be shown. These values will not change until the next time you refresh your on-line roster.

9. EOF Eligibility Code

The EOF eligibility code for each term is based on the number of EOF grants received as of the end of the previous term. For example, a dependent student who meets the financial guidelines and did not receive an EOF grant in 2002-2003 or prior academic years will appear on this roster with a code 1 for both the fall and spring terms. The eligibility codes were determined on the basis of the number of awards received through the spring 2003 term. However, as soon as the fall 2003 EOF term request is processed and the EOF grant appears in the student's fall award area, the spring eligibility code will be re-evaluated on the basis of the number of EOF grants received through the fall 2003 term. In the example above, the student's spring eligibility code would change to 14 (renewal-potentially eligible) as soon as the EOF fall term request was processed and the student was found eligible. The EOF eligibility codes are explained below. Please retain these codes for future use.

EOF Eligibility Codes

<u>Code</u>	<u>Explanation</u>
1	Dependent student who has not previously received an EOF grant whose family income falls within the EOF Income Eligibility Criteria. Parents' total taxable and untaxed income does not exceed the maximum in the EOF Income Eligibility Scale.
2	Dependent student who has not previously received an EOF grant. Parents' total taxable and untaxed income exceeds the maximum in the EOF Income Eligibility Scale.
3	Independent student who has not previously received an EOF grant whose income falls within the EOF income eligibility criteria. Total taxable and untaxed income does not exceed the maximum in the EOF Income Eligibility Scale.
4	Independent student who has not previously received an EOF grant. Total taxable income exceeds the maximum in the EOF Income Eligibility Scale.
5	Student is attending a county college and has previously received EOF for six (6) semesters.* Institutions may approve two (2) additional semesters of funding to the student, if eligible.
6	Student is attending a county college and has previously received EOF for seven (7) semesters.* Institutions may approve one (1) additional semester of funding to the student, if eligible.
7	Student is attending a county college and has previously received EOF for eight (8) semesters.* Student has no further eligibility at a county college.
8	Student is attending a senior college and has previously received EOF for ten (10) semesters.* Institutions may approve two (2) additional semesters of funding to the student, if eligible.
9	Student is attending a senior college and has previously received EOF for eleven (11) semesters.* Institutions may approve one (1) additional semester of funding to the student, if eligible.
10	Student is attending a senior college and has previously received EOF for twelve (12) or more semesters.* Commission/EOF Office has not authorized additional EOF grants to complete an established five-year program.

- 11 Student is attending a four-year college and has previously received EOF for twelve (12) semesters.* Commission/EOF Office HAS GIVEN special approval for student to receive EOF for a 13th semester to complete a program of study that normally requires five years to complete.
- 12 Student is attending a four-year college and has previously received EOF for thirteen (13) semesters.* Commission/EOF Office HAS GIVEN special approval for student to receive EOF for a 14th semester to complete a program of study that normally requires five years to complete.
- 13 Student is attending a four-year college and has received EOF for fourteen (14) semesters.* Student has no further eligibility.
- 14 Student has previously received EOF and does not need special approval to receive a grant.
- 15 Student is ineligible for EOF because he/she is a TAG reject for reason(s) A, D-N, P, or U.
- 16 Student is ineligible for EOF because the institution he/she is attending is not approved for the EOF Program.

*Summer Session(s) not included. Please counsel students with EOF eligibility codes 5 through 13 to ensure that they do not exhaust their EOF eligibility.

NOTE: Institutions no longer need to formally request Commission/EOF Office approval to continue to receive funding for a student beyond ten semesters (over 5.0) at a senior institution or beyond six semesters (over 3.0) at a county college. Institutions may now grant the additional two semesters of funding to those students who are both 1) making satisfactory academic progress as defined in EOF Regulation 9A:11-2.13 AND 2) will be able to graduate by the end of the extended payment term(s).

The only students who may be eligible for a 13th and/or 14th semester are those enrolled in a baccalaureate program that is certified by the institution to be five (5) years in length (not including basic skills courses) to meet graduation requirements.

10. Award Counters

This is the number of EOF and TAG payments each student has received through the previous spring term. Each semester of full-time payment is counted as .50. Each semester of part-time payment is counted as .25. For non-funded students, the award counter shown is as of the last semester during which the student received an EOF Article III grant. Semesters of part-time EOF are included in the EOF award counter but a separate part-time award counter is also provided.

The part-time EOF grant may be awarded to students only three (3) times in the pursuit of an associates degree and four (4) times in the pursuit of a baccalaureate degree.

11. TAG Part-Time Indicator

If the student has been counseled to attend college part-time at an institution participating in the EOF part-time program, an indicator will appear in the format E/E. The E signifies that the student is receiving a part-time TAG award as a result of his/her participation in the part-time program. The E preceding the slash applies to the fall term; the E following the slash applies to the spring term. If the student is enrolled part-time for one term only, an indicator will not be printed for the term of full-time enrollment.

The number of credits for which the part-time student is enrolled MUST be reported by the institution on the disbursement roster, as the TAG award value will be based upon this information. Additionally, you must indicate the number of credits for which a student is enrolled on the on-line roster.

12. TAG Cancellation Code

The TAG cancellation code will be provided by term for reference purposes. Whenever an EOF term request has been made for a student whose TAG award has been canceled for reason code 1, 3, or 7, or for reason code 2 when the EOF admission type does not contain a “6”, (graduating senior enrolled less than full time), an indicator will appear in the format code/code. The code preceding the slash applies to the fall term; the code following the slash applies to the spring term. An indicator will be printed only for the applicable term.

TAG cancellation codes 1, 3, and 7, or code 2 when the EOF admission type does not contain a “6”, will also cancel the EOF award. Ineligible reason corrections must be submitted to HESAA through the campus financial aid office in accordance with established deadlines.

The TAG cancellation code may be viewed on the student’s expanded page or on the NJ Grants System.

V. *ENTERING AND/OR CHANGING DATA*

A. Entering/Changing Term Requests on Option A

1. To enter an initial term request, type the amount requested in the column or columns for the correct semester(s). Once a term request has been entered, all information pertaining to that semester, and the sex and ethnicity codes, must be entered if the information is not already present.
2. To change an existing term request, overwrite the term request for the semester. All information for the corresponding term that is not already present will be required.
3. To delete an existing term request, overwrite the term request with four (4) zeros for the correct semester(s). No other update is necessary. The student will continue to appear on your on-line roster until he/she transfers to another institution. As long as the term request is \$0000 the student will not be included in any enrollment figures.
4. The amounts appearing under the fall and the spring EOF awards on the screen are the amounts that will be requested on the NJ Grants System master file after processing is complete. Be sure that both semesters are overtyped if both semesters need to have a value other than the one appearing on the screen.
5. Once a student's record has been updated, the status codes will disappear. This is a signal to enable you to differentiate between records that have been updated and those that are in their original state.
6. If the term request entered for a student is more than the amount of funds available for the institution on the NJ Grants System college file, the record will be placed in hold status and an "H" will appear next to the term requests on the screen. Hold status for records is recalculated every time option A is entered from the main menu. For this reason, if the amount available on the college file has changed since the time the student was initially updated, the hold status for the student may change.
7. If a mistake has been made in updating a student, the record may be returned to its original state by spacing the fall and spring term request fields.
8. If a student is only attending your institution for one semester, the fields on the screen will be protected for the semester of non-attendance.
9. If a student is not part-time (admission type is not = "8"), the part-time credits field will be protected for the semester. If you want to change the student to part-time, first overwrite the admission type with an "8". Press enter. The

part-time credits field will be unlocked. Enter the number of credits and press enter.

10. Help screens are available for all fields on option A. Place the cursor on the field in question and press the PF1 key. A help screen will appear. To exit from the help screen, press PF3.

B. Restoring Awards To Their Original Status On Option A

It may be necessary to restore a term request to its original status for one of three reasons:

- the wrong record was updated
- the update did not achieve the desired result
- a previously updated record must be changed

Since changes made on-line are not processed by the Commission/EOF Office until the institution has certified the roster as complete, changes or corrections to previously updated records may be made by the institution at any time prior to roster certification.

To correct a previously updated record (prior to roster certification), the following steps must be followed:

- enter BLANKS (space bar) in both the Fall and Spring Term Request columns
- press ENTER to restore the record to its original status
- re-enter the update and press ENTER.

C. Entering An Initial Request On Option C

1. To enter an initial term request, type the social security number, last and first names, and amount(s) requested in the column or columns for the correct semester(s). Once a term request has been entered, all information pertaining to that semester, and the sex and ethnicity codes, must be entered.
2. Edits are performed to validate that the name and social security number entered on the screen match the ones on the grant master record. No student may be entered on this screen unless the student is already on the grant master file and is attending your institution for at least one semester. If you have entered information for a semester and it disappears from the screen and the fields become protected, it is because the student is not attending your institution for the semester.
3. To change an existing term request (prior to roster certification), overwrite the term request for the semester. All information for the corresponding term that is not already present will be required.

4. If the term request entered for a student is more than the amount of funds available for the institution on the grants college file, the record will be placed in hold status and an “H” will appear next to the term requests on the screen.
5. Hold status is recalculated every time option C is entered from the main menu. For this reason, if the amount available on the college file has changed since the time the student was initially updated, the hold status for the student may change.
6. If a mistake has been made in updating a student, either the fields in error may be overtyped, or the record may be removed by spacing the name fields and the fall and spring term request fields.
7. If a particular student is only attending your institution for one semester, the fields on the screen will be protected for the semester of non-attendance after the student is initially entered.
8. If a student’s college code has changed on the grant master since the student was entered on option C, and the student is no longer attending your institution, a message will appear that the student is not attending your institution. The student must be removed from the page by spacing out the name fields and the term requests before you may leave the page of data being displayed.
9. Help screens are available for all fields on option C. Place the cursor on the field in question and press the PF1 key. A help screen will appear. To exit from the help screen, press PF3.

D. Saving Data

There are three ways to save data entered on-line:

1. After entering a term request and demographics for a student, press ENTER. If the request is “clean” (no errors), the status code will disappear and the information is saved.
2. After entering a term request and demographics for a student, use the PF7 (page backward) or PF8 (page forward) keys. If the request is “clean” (no errors), the on-line roster will scroll forward or backward and your data is saved.
3. After entering a term request and demographics for a student, press the PF4 (process/menu) key to exit. If the request is “clean” (no errors), the on-line roster will exit to the main menu and your data is saved.

VI. PROCESSING THE ON-LINE ROSTER

The on-line roster is updated and processed on a two-week cycle. Institutions must lock the roster by 3:00 PM of the scheduled processing date (refer to the “NJ Grants & Scholarships Calendar of Processing Activities”). Rosters are processed and changes are applied to the NJ Grants System on Friday evening. On-line rosters remain locked the following Monday, are refreshed Monday night, and are unlocked Tuesday morning. You may begin making additional updates. Several changes have occurred on your roster that will indicate to you that processing has taken place:

EOF Status Code:

When the on-line roster has been refreshed (processed by the Commission/EOF Office) the EOF status code will reflect the status of the student’s EOF award on the NJ Grants System at the time of processing. A record that is complete will show “C”, a record that is in hold status will show “H”, and a record that is incomplete with a term request will show “P” for pending. The “P” signifies that an EOF award was requested but the student’s file is incomplete (student correctables, etc.).

Summary Page:

The summary page (option B) will show new student numbers and available balances as of the date and time of processing. The totals are as of the date indicated on the top of this page. Adjustments made after this date are not reflected on this summary page until the next time the roster is processed.

VII. REFRESHING THE ON-LINE ROSTER

The on-line roster is a listing of eligible students taken from the NJ Grants System. This list may be updated every two weeks to include new student filers, transfers, etc. There are several ways to update or refresh your roster.

- A. The on-line roster is refreshed when certification and processing is complete.

Processing your roster means updates have been made within specified deadlines, the roster is locked and certified and the signed certification page has been faxed by the established time. The Commission/EOF Office then authorizes your updates to be applied to the NJ Grants System. After processing, the on-line roster is refreshed. This means that the roster is unlocked and will show your completed updates and also show new filers, transfers, etc.

- B. The on-line roster will be refreshed if no updates have been made.

Refreshing a roster that has not been updated takes place automatically. If the on-line roster is not touched during the two-week cycle, it will be automatically locked and refreshed.

- C. If updates have been made, but certification is not complete, your roster will not be refreshed.

If updates have been made, but the roster was not locked or the signed certification page was not faxed, then the updates will not be applied to the NJ Grants System and the roster will not be refreshed. The on-line roster will remain locked and unprocessed until certification is finalized by the institution.

It is important to verify that processing has taken place. Updates made to the on-line roster but not applied to the NJ Grants System are not valid updates. Failure to certify may result in delays in awarding students' EOF and/or TAG awards.

<i>VIII. PROCESSING CALENDAR and DEADLINE DATES</i>
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A calendar entitled “NJ Grants & Scholarships Calendar of Processing Activities” is mailed out periodically by HESAA. The calendar includes EOF activities such as on-line roster certification dates, supplement and applicant roster print dates, and also established deadline dates. This calendar should be kept available for your assistance while processing EOF payments.

The on-line roster has established deadlines coded into the program. After the deadline, the corresponding semesters will be “locked” and you will be prohibited from entering any data in the locked columns. You will be notified of deadlines each year. You should also refer to the processing calendar for these deadline dates.

In addition to the calendar, the Commission/EOF Office sends out regular correspondence listing processing dates.

IX. HELPFUL HINTS

A. Who To Call for HELP

1. On-line Help Screens

Help screens in the on-line roster system will assist you with entering data. These screens will provide lists of acceptable codes. To access a help screen:

- place your cursor on the field you need assistance with
- press F1
- a popup screen appears
- press F3 to exit help screen

2. Commission/EOF Office

For additional assistance with the on-line roster, please contact:

Mary Alice Everett, Program Technician

voice#	(609) 984-2800
fax#	(609) 633-8420
e-mail	meverett@che.state.nj.us

3. Higher Education Student Assistance Authority HELP DESK

The HESAA has established a Help Desk number for technical assistance. If you are having problems accessing Gateway, or if you have forgotten your password, the Help Desk is available to assist you. For technical assistance, please call:

HELP DESK (609) 588-3315

B. Examples of Entering and/or Changing Term Requests

1. To enter a term request for the first time, type the amount requested in the column or columns for the correct semester(s). Once a term request has been entered, all information pertaining to that semester, and the sex and ethnicity codes, must be entered if the information is not already present.

Example 1: The student has no award and you want to request \$200 for both the fall and the spring terms.

Type 0200 in both the fall and the spring request columns for the student. Any information that is not already present must be entered for both the fall and the spring terms.

Example 2: The student has no award and you want to request \$200 for the fall term only.

Type 0200 in the fall term request and 0000 in the spring term request. Any information that is not already present must be entered for both the fall and the spring terms.

Example 3: The student has no award and you want to request \$200 for the spring term only:

Type 0200 in the spring term request. Any information for the spring term that is not already present must be entered.

2. To change an existing term request, overwrite the term request for the semester. All information for the corresponding term that is not already present will be required.

Example 1: The student has \$200 in the fall semester and \$200 in the spring semester, and you want to change the fall request to \$250.

Overtype the fall amount with 0250. This will have the effect of giving the student \$250 in the fall and \$200 in the spring.

Example 2: The student has \$200 in the fall semester and \$200 in the spring semester, and you want to change the fall and the spring requests to \$250.

Overtype the fall and the spring amounts with 0250.

Example 3: The student has \$200 in the fall and in the spring, and you want to cancel the spring amount only.

Overtype the spring amount with 0000. The fall amount will remain as 0200.

Example 4: The student has \$200 in the fall and \$200 in the spring and you want to cancel both the fall and the spring.

Overtype both the fall and the spring amounts with 0000.

Example 5: The student has reject codes in the fall and the spring and you want to request an amount for both fall and spring.

Overtyping both the fall and the spring reject codes with the amount you are requesting. This will enter a term request onto the NJ Grants System master file, but the student will not receive an award until the reasons causing the reject code(s) are corrected.

C. Frequently Asked Questions

Q: I want to delete a student's award. Do I change the admission and housing codes?

A: No. To delete an award, simply insert four (4) zeroes. The admission and housing codes remain the same UNLESS the student is non-funded.

Q: A student is a part-time graduating senior. How do I enter the number of credits?

A: You don't! Credits are required only for part-time students with admission type 8. Students who are part-time graduating seniors are coded as admission type 6 and are eligible to receive a full-time EOF award. Credits are not required.

Q: My roster is still locked. When can I start updating again?

A: The roster was locked for processing on Friday and will remain locked until the following Tuesday morning. If the roster is still locked on Wednesday, contact the Commission/EOF Office at (609) 984-2800 for assistance.

Q: I added students to the write-in section (option C). But now the system will not allow me to exit this option.

A: Check the bottom line for an error message. The on-line roster system will not allow you to exit the page if there is an unresolved error. If you still are unable to exit, try using the space bar to space out the entire student line (from social security number to part-time credits).

Q: One of my students filed a change form listing my college as first choice. But the student still does not appear on the on-line roster.

A: Check the date of your on-line roster (go to option B). If the change form was filed AFTER THIS DATE, the student will not appear on the roster. Check the NJ Grants System to make sure the change has been processed, then enter the student as a write-in (option C).

Q: I requested an award for a student but now the roster is showing zeros. Why was the award deleted?

A: The award may not have been deleted. Go to the student's expanded page of information to check the TAG Cancellation Code. The student may have been reported by the Financial Aid Director/Office as not enrolled or part-time, which would result in the EOF request being blocked. You should also check the student's file on the NJ Grants System.

Q: The student appears on Option A, but I can't enter any information for the student.

A: The on-line roster system will not allow you to enter an EOF request for a student who is ineligible for the following reasons:

- 1) Student reported year in college as four (or higher); if the student is an initial EOF recipient, this makes him/her ineligible.
- 2) Student is attending your institution for only one (1) semester.
- 3) It is after the established deadline date for requesting EOF for that semester.

Q: How do I check the current status of a student's state aid?

A: Use the NJ Grants System! Everyone who has the ability to access the EOF on-line roster was also given access to the NJ Grants System. **NOTE: You must log on to the NJ Grants System at least once a month or your access will be DELETED.** This system allows you to view student records as they appear at any given moment. You also have access to your program's current Article III academic year allocation and expenditures. To access the NJ Grants System:

1. Log onto Gateway at www.hesaa.org. Follow the instructions.
2. At HESAA's logo screen, type in your User Id and password. Press ENTER.
3. At HESAA's main menu, scroll down to NJ GRANTS. Press ENTER.
4. You may be required to re-enter your User Id and password.
5. When the sign on ok screen appears, clear the screen and type LON.
6. Enter your security control number (your 9 digit social security number)
7. Press ENTER.

You are now logged on to the NJ Grants System. From a clear screen, enter the transaction needed. Transactions for accessing grant files are as follows:

STUDENT FILES:

XFND: Each student who has filed a FAFSA for the current academic year will have a GRANT MASTER file. This file has 15 pages (and 3 simulation pages) of information pertaining to the student and shows current EOF and TAG awards.

To access the grant master, type: XFND/SS# + ACADEMIC YEAR
(optional if AY = current year)
ex: xfnd/12345678997

XGE: The ELIGIBILITY file lists a student's cumulative history of state aid by award counter. TAG is on page 1 and EOF is listed on page 3.

To access the eligibility file, type: XGE/SS#
ex: xge/123456789

XGH: The HISTORY file shows the student's history of state aid by semester.

To access the history file, type: XGH/SS#
ex: xgh/123456789

XNTE: The STUDENT NOTICE file lists each SEN, AIR, SNAD, and/or verification letter sent to the student.

To access the notice file, type: XNTE/SS# + ACADEMIC YEAR
(academic year must be entered)
ex: xnte/12345678997

XCFD: The CORRESPONDENCE file shows correspondence sent/received by the HESAA that affect a student's award.

To access the correspondence file, type: XCFD/SS#
ex: xcfd/123456789

XGNM: The NAME file can be used to find a student if you do not know the social security number.

To access the name file, type: XGNM to display menu, enter
complete or partial name and press
enter

COLLEGE FILES:

XGC: The COLLEGE MASTER file provides roster information, college budgets, disbursements, and EOF allocations/balances. This file is updated in “real time”.

To access the TAG college master, type: XGC/AY + CSS CODE
(academic year must be entered)
ex: xgc/971234

To access the EOF college master, type: XGC/AY + CSS CODE + E
(academic year must be entered)
ex: xgc/971234e

XGCS: The COLLEGE STATISTICS file sorts TAG and EOF recipients by various criteria. For example: page 2 provides a breakdown of financially independent EOF students by # awarded, # rejected, # non-funded, and # canceled. This file is updated twice a week.

To access the college statistics file, type: XGCS/AY + CSS CODE
ex: xgcs/971234